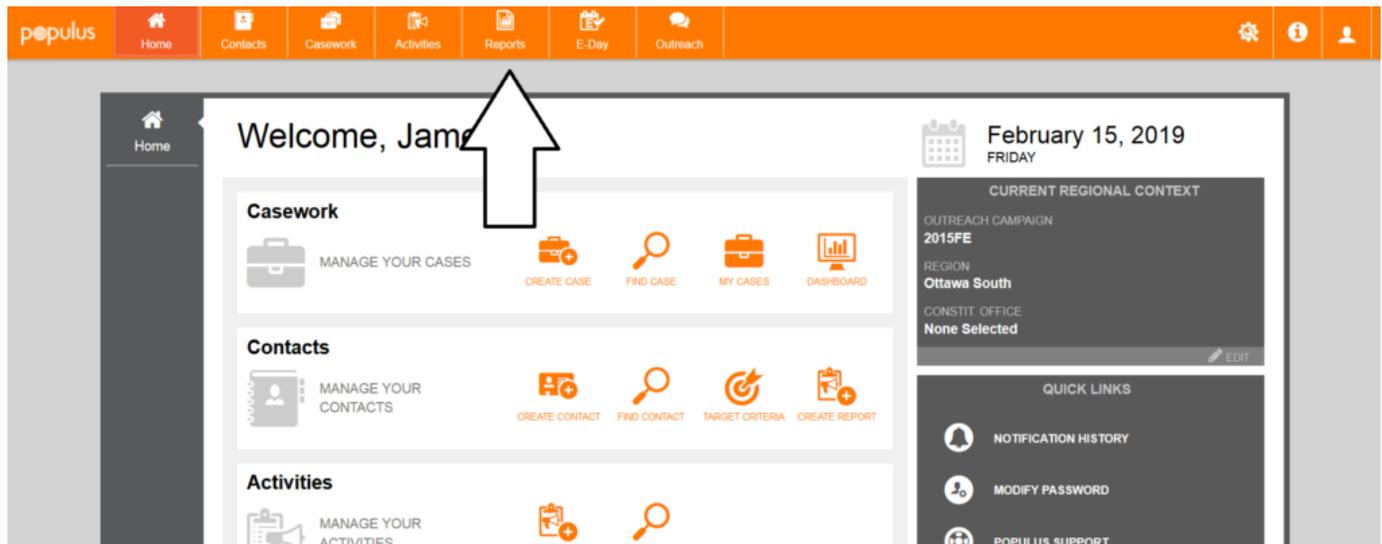


# Generating Reports

Reports are automatically generated spreadsheets that contain a treasure trove of information that might be useful to a campaign manager. Reports can be used to discover neat things like:

- The number of requested and number of delivered lawn signs in the riding
- The number of marks, number of contacts, and number of people who have voted in each poll
- The addresses of buildings with more than 20 units

## Generating a Report



The screenshot shows the Populus dashboard interface. At the top, there is a navigation bar with the following tabs: Home, Contacts, Casework, Activities, Reports, E-Day, and Outreach. The 'Reports' tab is highlighted in orange and has a white arrow pointing to it. Below the navigation bar, the main content area is divided into several sections. On the left, there is a sidebar with a 'Home' button. The main content area starts with a 'Welcome, James' message. Below this, there are three main sections: 'Casework', 'Contacts', and 'Activities'. Each section has a 'MANAGE YOUR [SECTION]' button and several action buttons. The 'Casework' section has 'CREATE CASE', 'FIND CASE', 'MY CASES', and 'DASHBOARD' buttons. The 'Contacts' section has 'CREATE CONTACT', 'FIND CONTACT', 'TARGET CRITERIA', and 'CREATE REPORT' buttons. The 'Activities' section has 'MANAGE YOUR ACTIVITIES' and a button with a plus sign and a magnifying glass. On the right side of the dashboard, there is a 'February 15, 2019 FRIDAY' date display, a 'CURRENT REGIONAL CONTEXT' section with 'OUTREACH CAMPAIGN 2015FE', 'REGION Ottawa South', and 'CONSTIT. OFFICE None Selected', and a 'QUICK LINKS' section with 'NOTIFICATION HISTORY', 'MODIFY PASSWORD', and 'POPULUS SUPPORT'.

From the homepage, click on the **Reports** tab.

populus Home Contacts Casework Activities Reports E-Day Outreach

Dashboard My Reports Report Administration

Report History  
Create Report

2 2 0 0 0  
COMPLETED IN PROGRESS QUEUED FAILED

9:36:46 AM EST

File	Type	File Size	Status	Date Submitted	Action
Marks with Leaning by Poll (Ottawa South) 2019-02-14.csv	Report	54 KB	Completed	2019-02-14 02:08:54 PM EST	
Marks with Leaning by Poll (Ottawa South) 2019-02-14.csv	Report	50 KB	Completed	2019-02-14 01:46:33 PM EST	

50 Results (2)

Click **Create Report**.

populus Home Contacts Casework Activities Reports E-Day Outreach

Dashboard My Reports Report Administration

Report History  
Create Report

Create Report Wizard

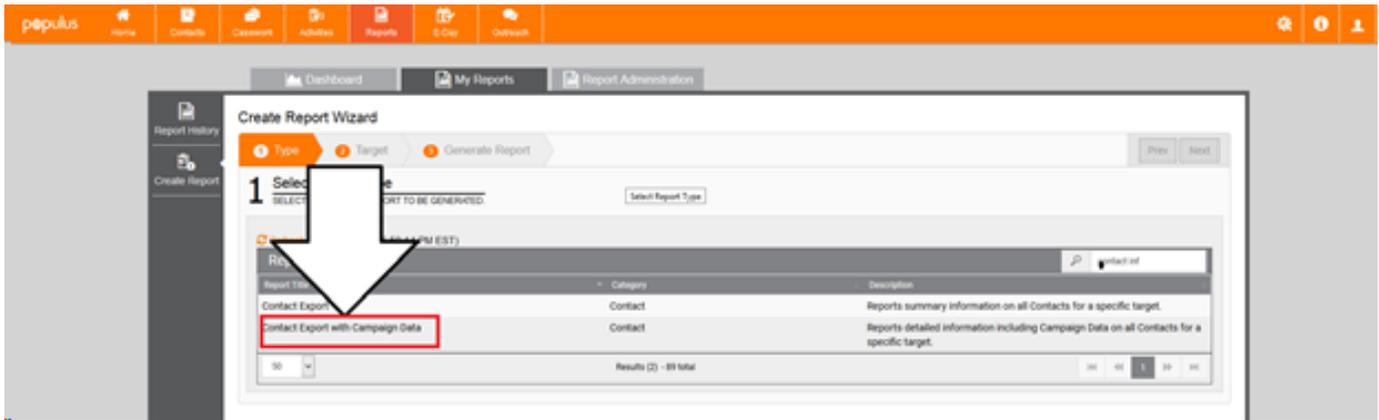
1 Type 2 Target 3 Generate Report

1 Select Report Type  
SELECT THE TYPE OF REPORT TO BE GENERATED.

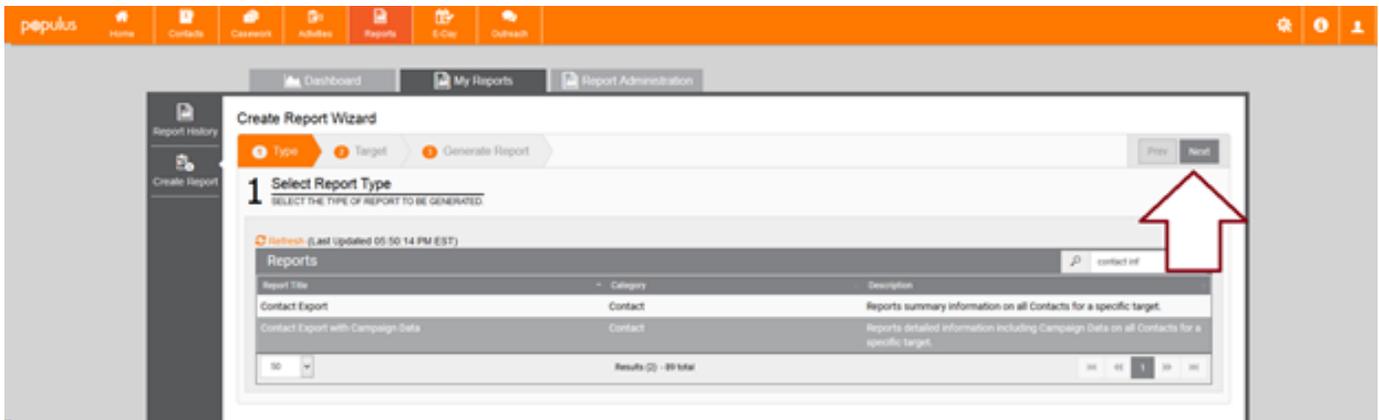
Refresh (Last Updated 10:11:46 AM EST)

Report Title	Category	Description
Activity Response Count	Activity	Reports the response count for a specific Activity.
All Active Users in All Case Offices in All Domains	Case Office	Report listing all active users (name and email) for all Case Offices for all Domains
All Activities in Region Answer Report	Activity	
All Activities in Region Answer Statistics	Activity	
All Enabled Admin Users All Domains	Domain	Detailed Listing of all Enabled Sysadmins and Domain Admins for all Domains
All Enabled Users All Domains	Domain	Detailed listing of all enabled users across all Domains. Includes first and last names and usernames.

Search for a report by name by typing into the **search bar**. In this example, we're trying to generate a report containing the contact info and campaign data for people in the riding.



Once your search has sufficiently narrowed down the list of reports, click the one that you want to generate.



Then, press **Next**.

At this point, you need to make a decision on whether or not you want to generate the report for everyone in the riding or only for a specific set of people. A basic rule of thumb: if you're trying to generate a report about the entire riding (**has voted count by poll**, **contact count by poll**, or a **sign count by poll**) then you should target the entire riding.

If you're looking to narrow down the output of a report (**callhub phone export** but only for Tier A contacts,) then you can try our prebuilt target criteria:

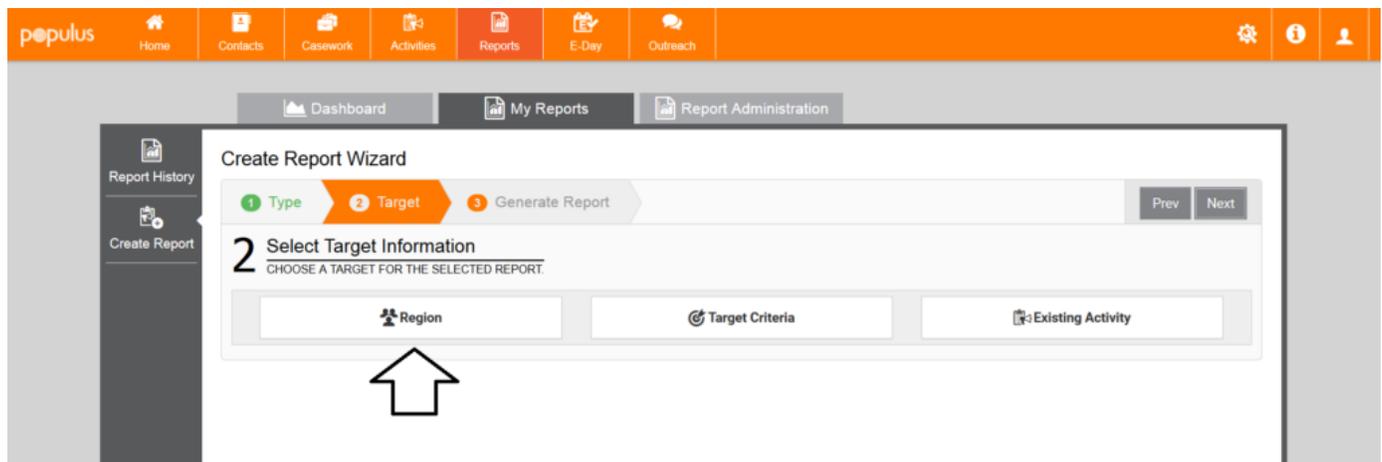
- **1 Workers / Bénévole** is a list of callable uncontacted volunteer prospects
- **2 Signs / Pancartes** is a list of callable uncontacted people who are likely to take lawn signs
- **3 Tier/Niveau A** is a list of callable uncontacted Tier A contacts. Tier A contacts have been identified as much more likely to be supporters than the average person in the riding.
- **4 Tier/Niveau B** is a list of callable uncontacted Tier B contacts. Tier B contacts have been identified as somewhat more likely to be supporters than the average person in the riding.
- **5 Tier/Niveau C** is a list of callable uncontacted Tier C contacts. Tier C contacts are roughly

as likely to be a supporter as the average person in the riding.

- **Donors / Don – A** is a list of people who donated in the 2015 Federal Election
- **Donors / Don – B** is a list of people who donated in other campaigns
  
- **Contacts with phone / Contacts avec téléphone** is a list of all people who have phone numbers who are not do-not-contact
- **Contacts with email / Contacts avec courriel** is a list of all people who have an email address who are in Populus
  
- **Foot / PÀP AB** is a list of all uncontacted people who are in tier A or tier B. This is typically used for foot canvasses

Once you're finished selecting your **Region** or **Target Criteria**, click **Next**.

## Generating a Report for the Whole Riding



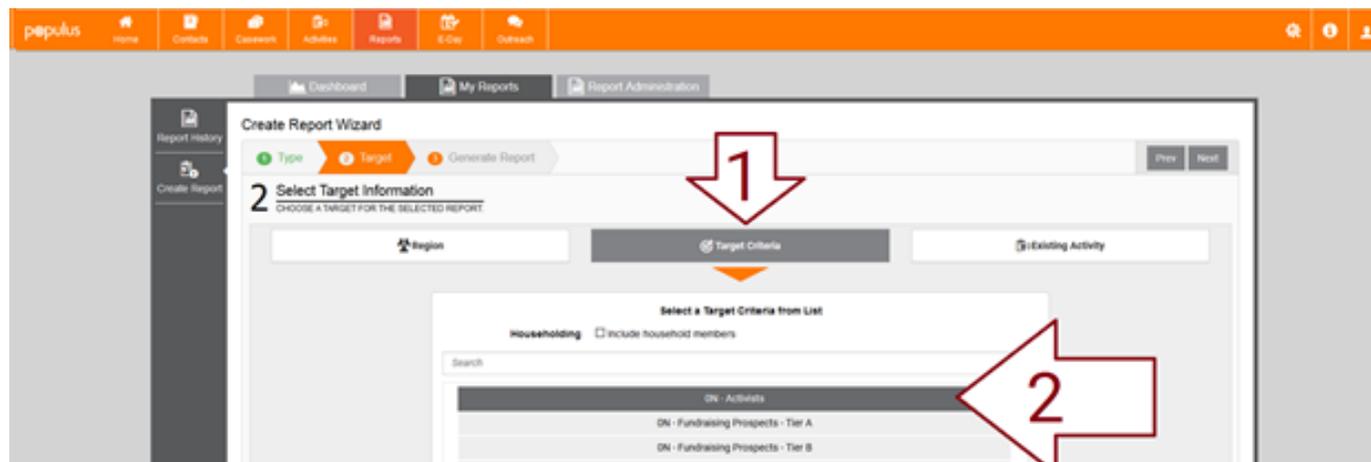
Most reports that you'll generate will be targeting the whole riding.

*For example, if you're looking for the number of people who have voted in each poll, you'll target the whole riding with the "Has Voted Count by Poll" report. **There's no need to generate a target criteria of people who have voted.***

*If you only want to generate a spreadsheet of the people who have voted in a specific set of polls, you **could** create a target criteria that contains people who live in those polls—but that might take longer than just targeting the entire riding and removing the polls you don't need*

from the generated spreadsheet yourself.

## Generating a Report for a Target Criteria

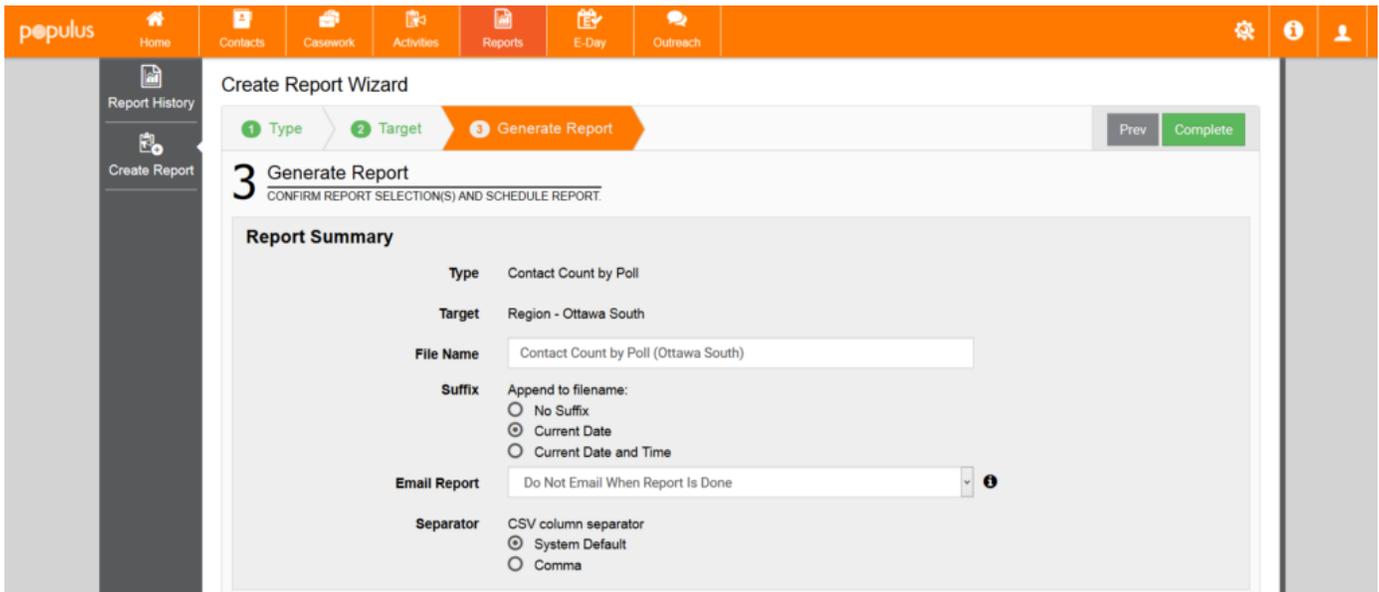


In this example we're trying to generate a report containing the contact info and campaign data for a set of activists in the riding.

If I'm trying to count everyone, I'm going to need to target the entire riding. This is pretty common: Most reports that you'll generate will be targeting the whole riding (sign count, list of addresses with 20+ units, marks by poll), but in this case we're going to use a target criteria to target **Tranche 1 – Workers / Bénévole**.

A reason why you may want to target Tranche 1 – Workers / Bénévole is if you're starting up a your campaign and you want contact information for people that you can call to get initial volunteers and donations.

When you've chosen either a **Target Criteria** or the entire **Region**, click **Next** in the top right corner.

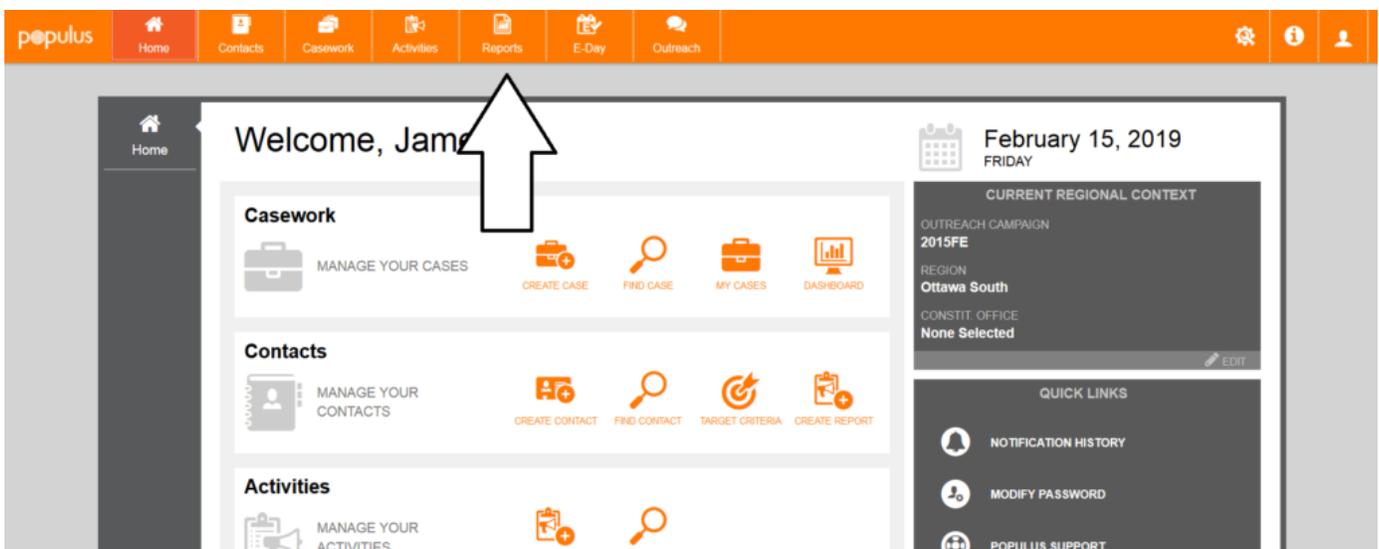


This page gives you a few options for your reports.

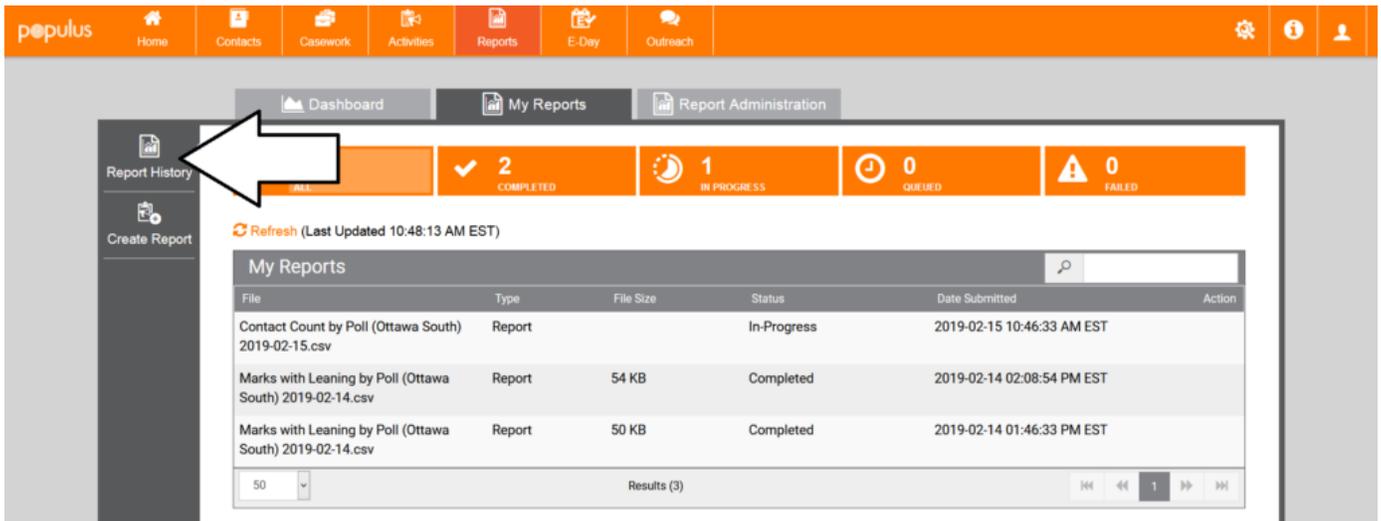
It's recommended to change **Email Report** from *"Do Not Email When Report is Done"* to *"Email and Attach Report When it is Done."* This will save you a bit of time logging in to download the results and means that you don't need to constantly check on your report to see when it's finished.

Once that's done, click **Complete** in the top right corner.

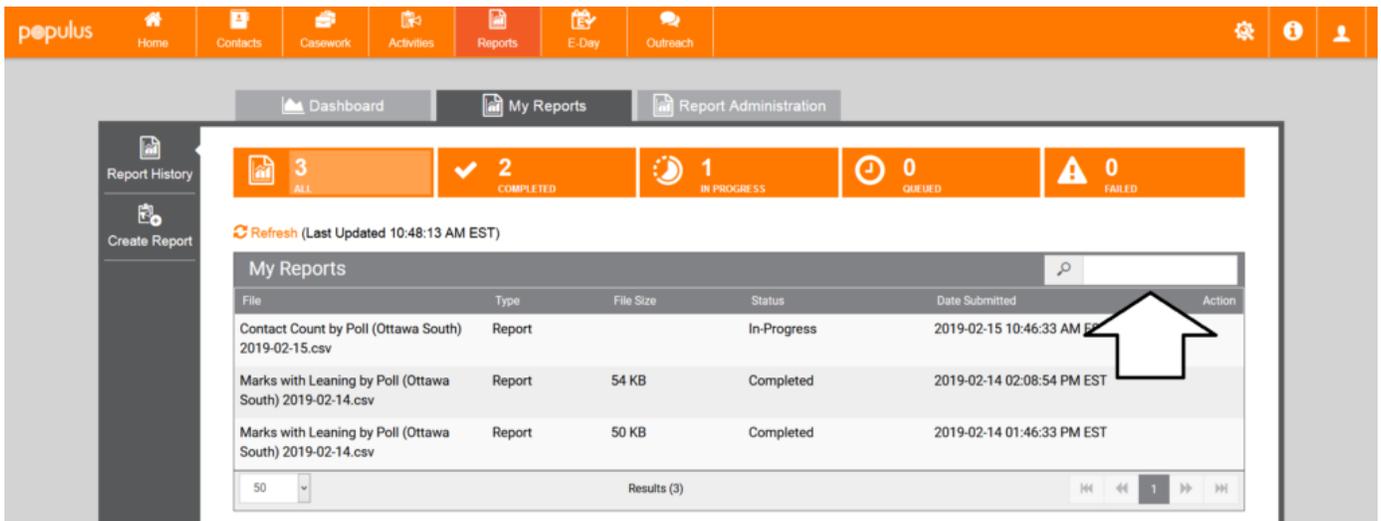
## Finding and Downloading a Generated Report



To find a report that was generated in the past, click on the **Reports** tab.



Click **Report History**



You can find your report by sifting through the list by hand.

If you have a particularly long list of reports, you can always search through them with the search bar.

populus Home Contacts Casework Activities Reports E-Day Outreach

Dashboard My Reports Report Administration

Report History Create Report

Refresh (Last Updated 10:48:13 AM EST)

File	Type	File Size	Status	Date Submitted	Action
Contact Count by Poll (Ottawa South) 2019-02-15.csv	Report		In-Progress	2019-02-15 10:46:33 AM EST	
Marks with Leaning by Poll (Ottawa South) 2019-02-14.csv	Report	54 KB	Completed	2019-02-14 02:08:54 PM EST	
Marks with Leaning by Poll (Ottawa South) 2019-02-14.csv	Report	50 KB	Completed	2019-02-14 01:46:33 PM EST	

50 Results (3)

Once you've found the report, click on it.

populus Home Contacts Casework Activities Reports E-Day Outreach

Dashboard My Reports Report Administration

Report History Create Report

Refresh (Last Updated 10:48:13 AM EST)

File	Type	File Size	Status	Date Submitted	Action
Contact Count by Poll (Ottawa South) 2019-02-15.csv	Report		In-Progress	2019-02-15 10:46:33 AM EST	
Marks with Leaning by Poll (Ottawa South) 2019-02-14.csv	Report	54 KB	Completed	2019-02-14 02:08:54 PM EST	
Marks with Leaning by Poll (Ottawa South) 2019-02-14.csv	Report	50 KB	Completed	2019-02-14 01:46:33 PM EST	

50 Results (3)



Then, click on the grey download icon to download the report.